Sage 100 Contractor 2019 (SQL)

Version 22.3 Release Notes

Canada and U.S. Editions

October 2020

Contents

Update 4 – October 2020 (Build 22.3.91)

> **Note:** You do not need to install this update unless you have employees working in New Jersey who earn more than 1 million but less than 5 million dollars per year.

U.S. Payroll Tax Tables–October 2020

Payroll tax tables changed for the following jurisdiction:

- New Jersey

Update 3 – July 2020 (Build 22.3.84)

U.S. Payroll Tax Tables–July 2020

Payroll tax tables have changed for Idaho.

Canadian Payroll Tax Tables–July 2020

This section highlights federal and provincial tax changes.

Federal Payroll Tax Changes

No federal payroll tax changes are included in this update.

Provincial and Territorial Payroll Tax Changes

The following provinces and territories mandated payroll tax changes, effective January 1, 2020:

- British Columbia
- Yukon

For detailed information on personal amounts, see the TD1 form for each province or territory.

Enhancements in this Update

New 5-1-8 Hours Report and Support for Covid-19 Related Absences and Wages

Update 3 includes the new **5-1-8-91 Absence Hours and Wages~by Employee** report, which you can use to determine the hours and wages for employees missing work due to the Covid-19 virus or to care for sick family members. You can use the information from this report.

This report was first available for download in April in response to the Covid-19 crisis. It is now part of the program installation.

In summary, you use this report in conjunction with the Absence field on **5-2-2 Timecard** lines. First, you need to create new absence types to track absences because of sickness from the Covid-19 virus or because an employee is caring for family members who are sick with the virus. Then, you use these absence types to identify paid Covid-19 related absences on 5-2-2 Payroll record lines.

You then use the Covid-related absence codes as selection criteria when printing the report. The report prints, for each employee, the hours and wages paid for each absence type. The report uses the wages per line based on workers compensation wages. For salaried employees you must have at least one line with hours entered for this report to work as expected.

For information about tagging timecard lines as Covid-19 related absences, see The Families First Coronavirus Response Act (United States) / Canada Economic Response Plan in Sage Knowledgebase.

For information about how to use this report, see Absence Hours and Wages by Employee report in Sage Knowledgebase.

For information about reporting on loans received under the CARES Act Paycheck Protection Program, see . CARES Act Paycheck Protection Program - from receiving the loan to running reports.

Fixes – Update 3

We have fixed the following issues in the July 2020 product update for Sage 100 Contractor version 22.3:

- The **Combined AR/SR Aging** reports print properly even when you leave the Period selector blank.

- In the 4-3-1 Select Invoices to Pay window, you no longer receive an error message when selecting invoices by vendor name or job name if the invoices have a secondary payee.

- In the **1-5 Bank Reconciliation** window, when you undo a final reconciliation, records that have a Void status remain void.

- In the **9-5 Takeoffs** window, updating minimum quantities by task calculates the correct quantities.

Fixes for the U.S. Edition

The following issues were fixed specifically for the U.S. Edition of Sage 100 Contractor:

- Aatrix Certified Payroll reports now display the correct hourly pay rate for overtime that includes premium pay.

- We fixed an issue that you might have experienced if you updated Aatrix forms recently and you tried printing the **5-4-2 PFML (Paid Family and Medical Leave)** reports for Massachusetts or Washington. These reports are available again for selection from the list of available forms.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- When you pay vendors using the **Open Stub** check, Sage 100 Contractor no longer rounds to the nearest dollar the holdback and discount amounts in invoice details.

- Sage 100 Contractor no longer stops working when you save a **9-5 Takeoffs** template that includes a line where PST is set to either Yes or No.

Update 2 – March 2020 (Build 22.3.66)

U.S. Payroll Tax Tables–March 2020 Update

Payroll tax tables have changed for the following jurisdictions:

- Arkansas
- Maryland

Fixes – Update 2

We have fixed the following issues in the March 2020 product update for Sage 100 Contractor version 22.3:

- When you create a new company based on an existing company, bank reconciliations from the existing company are not carried into the new company.

- Sage 100 Contractor includes vendors correctly on the **Check Transmittal**, **Pre-Lien**, and **Set to Pay** reports when you sort payees alphabetically before printing.

- The API now displays the correct warning when you try to post an invoice that has an invoice line with a quantity that exceeds the quantity available on a referenced PO.

- Transactions that you match using Bank Feeds and save as a trial reconciliation remain matched in the Match Banking Transactions screen.

Fixes for the Canadian Edition

The following issues were fixed specifically for the Canadian edition:

- The calculation of tax on Canadian bonuses is now consistent and working as expected.

Fixes for the U.S. Edition

The following issues were fixed specifically for the U.S. Edition of Sage 100 Contractor:

- State certified reports show the correct overtime hours for employees that had premium pay and also belong to a paygroup that have a Class Percent value.

Update 1 – January 2020 (Build 22.3.51)

U.S. Payroll Tax Tables

Payroll tax tables have changed for the following jurisdictions in this update:

- Colorado
- Maryland
- Massachusetts
- Minnesota
- Mississippi
- New Mexico
- Oregon
- Rhode Island
- South Carolina
- Vermont

Canadian Payroll Tax Tables

Federal Payroll Tax Changes

Effective January 1, 2020:

- The federal basic personal amount changed.
- Thresholds for tax brackets increased.
- The tax rate and some amounts relating to non-refundable tax credits changed.

Enhancements in this Update

You can create a backup copy of your company for Sage Support

If Sage Customer Support needs to examine a copy of your company to help you to resolve a problem with Sage 100 Contractor, they will ask you to create a backup copy of your company files.

With this update, a new utility in Database Administration enables you to create a stripped-down version of your company that does not include sensitive or personal information, and does not include external files, such as attachments.

On the **Create Sage Support Backup** tab, you select the company whose files you want to send to Sage Support, and then click the [**Create Backup**] button.

> **Note:** Because this backup is incomplete, you should *never* use it to restore your company data. For this reason, backups are saved in a separate **Support Backups** folder and include **BackupForSage** in the file name.

To back up a company for Sage Customer Support:

1. Click **Tune Up / Back Up / Restore** >**Create Sage Support Backup.**

2. On the **Create Sage Support Backup** tab, in the **Select company to send to Sage** box, select the company you want to back up.

   Sage 100 Contractor uses **..\Sage100Con\Backups\Support Backups** on the drive where you store your company data as the default location, but you can browse to a different location or type a different path in the **Enter the location for the backup file** box.

3. Click [**Create Backup**].

   Sage 100 Contractor creates a ZIP file, automatically naming the file after the company you are backing up and including **BackupForSage** in the file name.

Fixes – Update 1

We have fixed the following issues in the January 2020 product update for Sage 100 Contractor version 22.3:

- In the **1-5 Bank Reconciliation** window, when you reprint a previous bank reconciliation, the beginning and ending balances are correct, agreeing with the balances on the final reconciliation.

- When you post an Accounts Payable invoice that includes use tax, you no longer receive an audit error if the **Post 'use tax' expense to** option is not selected on the **Posting Accounts** tab in the **1-8 General Ledger Setup** window and the posted invoice includes subaccounts.

- When the **Use Higher Rate** option is turned on in the **5-2-2 Payroll Records** window, the program correctly uses the higher rate when you change the **Pay Type** or **Paygroup** on an existing line and choose to update the pay rate accordingly when prompted.

- When you use two or more selection criteria to print the **6-1-7-31 Over/Under Billings~Extended** report, you no longer receive an incorrect syntax error.

- When you print a **10-1-5-21 Gantt Chart** report for a year, the first column prints correctly when the start date for the schedule is the 6th or 7th day of the month.

- The **11-3 Dispatch Board** window no longer freezes when you scroll left to right after expanding the employee view and then switching to 1-Day view before collapsing the employees.

U.S. Payroll Tax Tables–December 2019

Federal payroll tax changes

Federal payroll tax tables have been updated for 2020.

For details, visit the IRS website at https://www.irs.gov.

State and other government-mandated payroll tax changes

Payroll tax tables changed for the following jurisdictions for 2020:

- California
- Illinois
- Iowa
- Kentucky
- Maine
- Missouri
- New York
- North Carolina
- North Dakota
- Ohio

Canadian Payroll Tax Tables–December 2019

This section highlights federal, provincial, and Quebec tax changes that go into effect January 1, 2020.

Federal payroll tax changes

Changes to Canadian payroll taxes for 2020 include the following:

- EI maximum annual insurable earnings and the EI premium rate changed.
- CPP maximum pensionable earnings and the basic exemption changed.
- The maximum CPP contribution changed.
- The calculation method for the Canada Employment credit amount changed for 2020.

For more information about these and other changes, visit Canada Revenue Agency.

Quebec payroll tax changes

Changes to Quebec payroll taxes for 2020 include the following:

- The indexation rate used to calculate the value of personal tax credits, taxable income thresholds, and other amounts changed.

  > **Important!** To apply the indexation factor for the new year, you must update the Quebec Personal Tax Credits for Quebec employees on the **Options** menu in the **5-2-1 Employees** window .

- The QPP maximum contribution amount and rate changed.
- The QPIP maximum insurable earnings changed.

For more information about these and other Quebec payroll tax changes, visit Retraite Quebec.

Other provincial and territorial payroll tax changes

The following provinces and territories mandated payroll tax changes, effective January 1, 2020:

- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Northwest Territories
- Nunavut
- Ontario
- Quebec
- Yukon

For detailed information on personal amounts, see the TD1 form for each province or territory.

Enhancements in Version 22.3

This section describes the new features and enhancements you will find in version 22.3.

Reports on personal information stored by Sage 100 Contractor

Sage 100 Contractor includes the following reports, which list the types of personally identifiable information that Sage 100 Contractor stores:

- 3-5-99 Job Consumer Privacy Report

- 3-6-99 Client Consumer Privacy Report

- 4-4-99 Vendor Consumer Privacy Report

- 5-2-1-99 Employee Consumer Privacy Report

A "Y" on the report indicates that the field, or associated fields, contains data.

Ledger balance fields can accommodate more digits

Throughout the program, we have increased the size of **Ledger Account Balance** fields in the database to accommodate larger amounts .

Enhancements for the U.S. Edition

Support for new W-4 forms

The **5-2-1 Employees** window includes a new **W-4 Information** tab where you enter the information required for W-4 forms that the IRS redesigned for 2020.

> **Important!** You enter W-4 information only for new employees or for existing employees whose personal information and deductions have changed. If you do not add information to this tab, Sage 100 Contractor uses the information on the Calculations tab to compute federal withholding information for existing employees. If you enter any information on the W-4 Information tab, Sage 100 Contractor uses it to compute pay for the employee.

> **Note:** On the Calculations tab, you can no longer change the entries in the **Marital**, **Std Allow**, **Add Allow**, **Table#**, and **Add W/H** columns for the federal income tax calculation. After January 1, 2020 you must make these changes on the **W-4 Information** tab.

To enter W-4 information for an employee:

1. In the **5-2-1- Employees** window, display the employee record that you want to adjust, or create a new employee record.

2. Click the **W-4 Information** tab.

   The **W-4 Information** tab is patterned after the new W-4 form, with steps corresponding to the steps on the form. (This tab provides a thumbnail of a sample W-4 form for your convenience. To display a larger version of the sample form in your image viewer, click the thumbnail.)

3. For **Step 1** (corresponding to Step 1 on the W-4 form), select a filing status from the list.

   > **Note:** You *must* select a status from the **Filing status** list before any other fields on the tab become available.

4. Complete the remaining steps as needed.

   > **Tip:** As you move through the fields on the tab, Sage 100 Contractor displays a red cartouche around the corresponding area of the thumbnail form.

Support for new consumer privacy legislation

> **Important!** The information in this article is not intended as legal advice. You should consult your legal counsel for specific requirements that your business may need to fulfill.

The California Consumer Privacy Act (CCPA), effective as of January 1, 2020, is designed to prevent the unauthorized disclosure and sale of personal information for consumers in California. "Consumers" can be your customers, vendors, employees and their dependents, tenants, and other contacts.

If your company does business in California, refer to the CCPA website (https://www.oag.ca.gov/privacy/ccpa) to determine what your company needs to do to comply. You should consult your legal counsel for specific requirements that your business may need to fulfill.

You can print reports that list the types of personal information stored in Sage 100 Contractor, including:

- 3-5-99 Job Consumer Privacy Report

- 3-6-99 Client Consumer Privacy Report

- 4-4-99 Vendor Consumer Privacy Report

- 5-2-1-99 Employee Consumer Privacy Report

A "Y" on the report indicates that the field, or associated fields, contains data.

For more information about Consumer Privacy reports, see Knowledgebase article 102281, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=102281.

If you need to delete any of the personal information represented in Consumer Privacy reports, refer to Knowledgebase article 102284, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=102284.

Do you have a product idea you want to share with us?

We want to hear it!

To suggest a product enhancement when you're working with Sage 100 Contractor:

1. On the Sage 100 Contractor desktop, click the **Home & Resources** tab > **Submit Product Idea**.

2. Log in to the Sage 100 Contractor Ideas site (or sign up).

3. Describe your idea.

4. (optional) Browse through others' suggestions, and vote for the ones you love!

Or visit https://www5.v1ideas.com/TheSageGroupplc/Sage100Contractor any time you're online!

Sage Construction Anywhere (SCA) Retirement

As of September 30, 2019, Sage retired Sage Construction Anywhere (SCA).

Contact your Sage business partner to learn about alternative solutions.

Fixes in Version 22.3

Fixes in both editions

Version 22.3 includes the following software fixes in both the U.S. and Canadian editions:

- You can scroll left to right on the Dispatch Board after switching from 5-Day view to 1-Day view with the employee list expanded. .

- The message number indicator on the Messages button now indicates the correct number of current messages.

Fixes for the U.S. Edition

The following issues were fixed specifically for the U.S. Edition of Sage 100 Contractor:

- When you run the **Missouri Certified Payroll** report (LS-57), if you select the **No Work Week** check box on the Aatrix form, the NO WORK WEEK overlay displays the proper pay period start date.

API for third-party developer products

Subcontract queries can return LINREF values

For the **Line Reference** field in the Subcontract table, SBCNLN.LINREF, we have added a new XML tag, SUBCONTRACTLINEREFNUMBER. Now, queries using QryReq or RunSql can return the LINREF value.

Upgrading from Sage 100 Contractor earlier than v21?

New entitlement server

For version 21, Sage moved its entitlement server (used to allocate license uses based on the license you have purchased) to a new, more secure server. If you are upgrading from a version of Sage 100 Contractor, after installing this version of the software, you will need to open the License Manager and enter your **Sage Client ID** and **Registration Name**.

> **Important!** You must enter your Client ID and Registration Name *exactly* as they appear for your account in the Customer Portal.

> **Tip:** Before you install version 21, open **License Administration**, copy the **Sage client ID** and **Registration name** from the **License information** tab, and then paste them into a text document. After installing version 21, copy the **Sage client ID** and **Registration name** from the text document into the version 21 License Administration window.

Summary of enhancements in earlier versions of Sage 100 Contractor (SQL)

Earlier versions of Sage 100 Contractor (SQL) provided a wide variety of new features, including many enhancements that our customers have requested.

The following table is a list of the most significant features introduced in earlier versions, details of which you can read about in the Release Notes for the respective version.

Enhancements by version	U.S. Only	Canada Only	API
Version 22.2 enhancements (For details, see the v22.2 Release Notes)			
Integration with eTakeoff Dimension			
Refinements for 'Use Taxes'	x		
Support for Equal Employment Opportunity Commission (EEOC) Reports	x		
Version 22.1 enhancements (For details, see the v22.1 Release Notes)			
Command-level security for many options and Post commands			
Ability to save final reconciliations for later access			
Ability to transfer amounts between bank accounts			
Warning when posting an AP invoice with no subcontract			
Ability to view Sage messages in Sage 100 Contractor			
Job templates to use and reuse in takeoff			
Ability to report on use taxes	x		
New payroll type for retiring allowances		x	

Enhancements by version	U.S. Only	Canada Only	API
Several additional customer-requested enhancements			
Version 21.3 enhancements (For details, see the v21.3 Release Notes)			
Some minor enhancements plus U.S. tax updates.			
Version 21.2 enhancements (For details, see the v21.2 Release Notes)			
Ability to merge client records			
Ability to merge vendor records			
Ability to include a record's attachments when you email forms			
Ability to email statements to jobs and clients			
Ability to record external vendor payments			
Ability to specify a secondary backup location			
Ability to track vendor certificates by job			
More ways to list vendor invoices to pay			
Version 21.1 enhancements (For details, see the v21.1 Release Notes)			
Bank feeds			
Ability to email direct deposit stubs at a later date			
Enhanced cost type validation			
Enhanced Search (Find) in the 9-5 Jobs window			
Ability to move company to a new drive			
Ability to view an employee's pay raise history			
Ability to create timecards for individuals in Daily Payroll			
Ability to create payroll records for salaried employees			
Ability to restrict exclusive access for specific non-administrative users			

Enhancements by version	U.S. Only	Canada Only	API
Version 20.7 enhancements (For details, see the v20.7 Release Notes)			
Ability to print a new 5-1-8-86 Vacation Hours Earned and Used Report	X		
Version 20.6 enhancements (For details, see the v20.6 Release Notes)			
New Server Management Tools			
Ability to set records "Inactive"			
More efficient login			
Ability to replace Cost Codes, Vendors, Tasks, or Inventory Locations in a takeoff			
New Combined Accounts Receivable and Service Receivables aging reports			
Ability to print Accounts Receivable Aging Reports by Invoice Date			
Ability to print Accounts Payable Aging Reports by Invoice Date			
Ability to print Service Invoice Aging Reports by Invoice Date			
New banking categories you can assign to bank-related journal transactions			
Improved vacation tracking	X		
Version 20.5 enhancements (For details, see the v20.5 Release Notes)			
Ability to use new custom fields in most windows			
Ability to tag rows for followup in the 9-5 Takeoffs grid			
Audit Information is available in Advanced Company Settings			
Numeric fields provide automatic calculation			
Easier access to user subfolders in workgroups			

Enhancements by version	U.S. Only	Canada Only	API
Ability to correct the period of a posted payroll transaction			
Ability to skip automatic calculation during takeoff			
Ability to filter cost codes by Job and Phase in lookup windows			
Ability to filter unassigned work orders on the Dispatch Board			
A new option for saving and selecting company-specific custom reports and forms			
Ability to use a new standard calendar to select dates			
Support for Microsoft SQL Server 2016 and Windows 2016 Server			
Ability to copy user process maps			
Ability to use high contrast display settings for Windows 10			
Ability to print a new Payroll Check Register 5-1-2-31 by check date			
3-7 Progress Billing and 12-2 Inventory Allocation allow 5,000 rows			
Tax and Workers' Comp rates in 4-4 and 4-2 use 4 decimal places	X		
Workers' Comp Reports 21, 86, and 96 show Overtime Hours	X		
Version 20.4 enhancements (For details, see the v20.4 Release Notes)			
Ability to copy external files to other users			
New option to approve the removal of employee records			
Version 20.3 enhancements (For details, see the v20.3 Release Notes)			
Ability to view change history in records			
New option for closing purchase orders automatically			
Support for Paya Exchange Desktop 2.0			
Support for customized tables and views			
Ability to use a new window to add client service locations quickly			

Enhancements by version	U.S. Only	Canada Only	API
Effective rate shown for Sales Tax Districts (U.S. only)	X		
API supports adding and removing attachments			X
API enforces locks			X
Schema change for Global Variables			X
Version 20.2 enhancements (For details, see the v20.2 Release Notes)			
Simplified schedules lookup			
QueryJobCost (API Enhancement)			X
SetExclusive (API Enhancement)			X
Version 20.1 enhancements (For details, see the v20.1 Release Notes)			
More versatile lookup windows			
Unique Payroll record numbers			

Known issues and comments

The following sections describe known issues and problems in Sage 100 Contractor Version 22.3.

General

Compliance and Payroll Checks

> **Important!** The sample check forms that come with Sage 100 Contractor may not be fully compliant with all federal, state, and local laws, and other requirements that can differ from one jurisdiction to another. It is your responsibility to familiarize yourself with all applicable laws and requirements, and to modify check forms as needed to ensure compliance. For information about customizing check forms, see 13-5 Form/Report Page Design in the Sage 100 Contractor help, or contact your Sage business partner for assistance.

Internet access required for Sage 100 Contractor

Sage 100 Contractor features, such as printing or efiling tax forms, submitting enhancement requests, accessing Help, or downloading periodic product or tax updates all require Internet access.

To take advantage of these features, ensure that any workstation or server that Sage 100 Contractor is installed on has access to the Internet.

During installation of Sage 100 Contractor, the computer serving as the Sage license server must be able to connect to the Internet to obtain licenses. Once installation is complete, you can check out license uses for each computer where Sage 100 Contractor is installed, then disconnect the Sage license server from the Internet.

> **Note:** A static Internet connection using a compatible web browser is required for Sage Construction Anywhere. For current information on supported browsers, supported Sage 100 Contractor versions, and other system requirements, see the Sage Construction Anywhere help at http://help.sageconstructionanywhere.com/sage100contractor/help/Default.htm#01_Setup/System_requirements.htm.

Configuring anti-virus software and third-party firewalls

During installation of the Sage 100 Contractor Hosting Framework, the Windows Firewall is configured automatically to allow the Sage 100 Contractor Hosting Framework to act as a TCP server. If you use some other firewall, however, you may need to manually adjust some settings in the firewall in order to ensure proper operation.

You can use the following basic procedure to manually configure the Windows Firewall to allow the Sage 100 Contractor Hosting Framework to communicate with other computers. Use it as the basis for manually configuring other third-party firewall products.

To configure the Windows Firewall:

1. For Windows Server 2008, click **Start > Control Panel > Security**.

   For Windows 7, click **Start > Control Panel > System and Security**.

   For Windows 8.1 and Windows 10, click **Start > All apps > Control Panel > System and Security**.

2. Open **Windows Firewall**, and then select **Allow a program or feature through Windows Firewall**.

3. Select Sage 100 Contractor **Hosting Framework** on the list, if it is not selected..

> **Note:** By default, the exception is set to allow access by any computer on the network. You can refine this setting by selecting the **Change Scope** button. Be aware that restricting the scope incorrectly can cause the computer to be unable to connect with some or all of the other machines on the network.

Files to exclude when manually configuring your firewall for Windows 8.1 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL
- C:\Program Files\Sage\Sage 100 Contractor SQL
- C:\ProgramData\Aatrix Software SQL
- C:\Program Files\Aatrix Software SQL
- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL
- Network location of Sage 100 Contractor SQLdata. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 8.1 Professional 64-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL
- C:\Program Files (x86)\Sage\Sage 100 Contractor SQL
- C:\Program Files (x86)\Aatrix Software SQL
- C:\ProgramData\Aatrix Software SQL

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 7 Professional 32-bit

- C:\ProgramData\Sage\Sage 100 Contractor

- C:\Program Files\Sage\Sage 100 Contractor

- C:\ProgramData\Aatrix Software

- C:\Program Files\Aatrix Software

- C:\%LocalAppData%\Sage\Sage 100 Contractor

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 7 Professional 64-bit

- C:\ProgramData\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Aatrix Software SQL

- C:\ProgramData\Aatrix Software SQL

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows 8.1 Professional

- C:\ProgramData\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Aatrix Software SQL

- C:\ProgramData\Aatrix Software SQL

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Files to exclude when manually configuring your firewall for Windows Server 2008 R2, 2011, 2012

- C:\ProgramData\Sage\Sage 100 Contractor SQL

- C:\ProgramFiles (x86)\Sage\Sage 100 Contractor SQL

- C:\Program Files (x86)\Aatrix Software SQL

- C:\ProgramData\Aatrix Software SQL

- C:\%LocalAppData%\Sage\Sage 100 Contractor SQL

- Network location of Sage 100 Contractor data. (If you install SQL Server Express using Database Administration, this location is C:\Sage100Con\Company\.)

Software and hardware required to support Microsoft SQL Server

Version 22.3 requires an instance of Microsoft SQL Server. You can download and use Microsoft SQL Express at no charge, or you can use the full version of Microsoft SQL Server. You can even start using Microsoft SQL Express, and upgrade to the full version of Microsoft SQL Server later, if necessary.

When you first open the new Database Administration tool, the program tries to configure an instance of Microsoft SQL Server with optimal settings for Sage 100 Contractor for you. If you do not already have an instance of Microsoft SQL Server, you can let the Database Administration tool download, install, and configure Microsoft SQL Express for you.

Refer to Knowledgebase article 98460 for detailed information about supported operating systems and software, and for minimum hardware requirements.

Installation of Microsoft SQL Server on a domain controller is not recommended

Microsoft recommends against installing SQL Server on a domain controller, and does not support SQL Server on a read-only domain controller should you encounter any problems with this configuration.

Because you must install Database Administration on the same machine as SQL Server, you should not install Database Administration on a domain controller. To guard against inadvertent installation on a domain controller and the potential for irrecoverable data losses, you will receive a warning if you attempt to install Database Administration on a machine used as a domain controller .

For more information, see the Microsoft Knowledgebase article https://support.microsoft.com/en-us/kb/2032911.

About .NET Framework

.NET 4.6.1 Framework is required

If Microsoft .NET 4.6.1 Framework is not already installed, it will be installed automatically when you install Sage 100 Contractor. Installation of .NET 4.6.1 Framework alone may take up to 20 minutes per computer.

Make sure that both your client and server computers meet the minimum requirements for installing both Sage 100 Contractor software and .NET 4.6.1 Framework.

Note: If Sage 100 Contractor requires an installation of .NET 4.6.1 Framework, the Sage 100 Contractor installation process may continue automatically after the .NET Framework installation is completed. If you are prompted to restart your computer after the .NET Framework installation, you must do so to continue the Sage 100 Contractor installation.

.NET 3.5 is also required

In some situations, you may need to turn on .NET 3.5 manually by selecting the .NET 3.5 check box in the Windows Features dialog box. For more information, see Knowledgebase article ID 68381, available at https://support.na.sage.com/selfservice/viewdocument.do?externalId=68381.

Windows Small Business Server 2011 is not supported

Microsoft Small Business Server 2011 does not support .NET Framework 4.6.7, which Sage 100 Contractor (SQL) requires. Unfortunately, this means that Sage 100 Contractor (SQL) cannot support Small Business Server 2011.

Turning on Microsoft .NET 3.5

Microsoft .NET 3.5 must be available and enabled prior to installing Sage 100 Contractor on a Windows Server 2008 R2 machine. Server 2008 R2 comes with .NET 3.5 loaded but not installed, so Sage 100 Contractor does not install it automatically.

If you attempt to install Sage 100 Contractor without .NET 3.5 installed, you receive the following message during the licensing install: "Sage.CRE.HostingFramework.Service v3.2 has stopped working." When you click [**OK**], the installation continues, but the services have not been installed so Sage 100 Contractor cannot open. The Sage.CRE.HostingFramework Service will not install unless .NET 3.5 has been installed. If you receive the above message during installation, install .NET Framework 3.5., and then reinstall Sage 100 Contractor.

The following instructions are for Windows Server 2008 R2.

To verify that .NET 3.5 is installed on Windows Server 2008 R2:

1. Click the **Start** button in the lower left corner of the display.
2. Highlight **Administrative Tools** and select **Server Manager**.
3. In the **Server Manager** interface, click **Features** to display all the installed Features in the right-hand pane. Verify that .NET Framework 3.5.1 is listed.

To enable .NET 3.5 on Windows Server 2008 R2:

1. In the **Server Manager** interface, select **Add Features** to display a list of possible features.
2. In the **Select Features** interface, expand **.NET Framework 3.5.1 Features**.

3. Once you expand **.NET Framework 3.5.1 Features**, you will see two check boxes. Check the box next to .NET Framework 3.5.1 and click **Next**.

4. In the **Confirm Installation Selections** interface, review the selections and then click [**Install**].

5. Allow the installation process to complete and then click [**Close**].

> **Note:** Enabling .NET Framework 3.5.1 may require a reboot.

About network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component, to enable communication among computers on a network. By default, Sage 100 Contractor uses the TCP starting port 48760. Certain configurations can potentially disable the communication:

- You must enable file sharing on your computers. To enable file sharing, follow the instructions in the Windows Help.
- TCP communication requires the selection of port numbers that are not in use by other processes on the local computer.
- Software firewalls running on the local computer can be configured to block processes from opening TCP ports, which will prevent communication through the TCP Remoting Channel.

PCI DSS Compliance

PCI DSS stands for Payment Card Industry Data Security Standard. It was developed by the major credit card companies as a guideline to help organizations that process card payments to prevent credit card fraud, cracking, and other security weaknesses and threats.

A company processing, storing, or transmitting payment card data must be PCI-compliant or risk losing its ability to process credit card payments and being audited and/or fined. (For more information about PCI standards, see https://www.pcisecuritystandards.org/.)

Sage 100 Contractor payment processing works exclusively with Paya to enable merchants to seamlessly process check and credit card transactions directly in Sage 100 Contractor. The payment processing program uses Paya Exchange, a secure payment-processing application, to connect to Paya and process check and credit card transactions.

Integrating your financial and operations system with Paya lets you process check and credit card transactions without storing your customers' sensitive card information in your database. Paya Exchange transmits check and credit card details through a secure connection to Paya, where they are stored in a PCI-compliant vault, protecting your from exposure to non-compliance penalties and credit card fraud.

> **Caution!** To avoid non-compliance with PCI standards, do not store credit card information in Sage 100 Contractor. Such storage creates unnecessary risk for your business and your customers.

Using Sage 100 Contractor Intelligence Reporting with Sage 100 Contractor 2019

Sage 100 Contractor Intelligence Reporting versions 20.2 and 19.7 are not designed to work side-by-side.

If you used Sage Intelligence Reporting with Sage 100 Contractor version 19.8 or earlier, follow the steps in Knowledgebase article 75640 when upgrading to version 22.3.

Tax Forms and eFiling by Aatrix configuration requirements

Tax Forms and eFiling by Aatrix requires an Internet connection for two reasons:

- For updating forms and executable files.
- For electronic filing (eFiling) of the forms.

If you experience an Internet connection problem, it may be due to problems communicating through an Internet firewall. Firewalls need to have access allowed through specific ports:

- The Tax Forms and eFiling Updater uses standard SSL/HTTP port 80 to access the site http://updates.aatrix.com.
- The eFiling component uses secure HTTPS on port 443 to access the site https://efile.aatrix.com.

By allowing access to aatrix.com, you allow both updates and eFiling. Occasionally, restrictions are tighter and only allow access to these ports by specific programs. Tax Forms and eFiling uses the following programs to access the Internet.

For updating using http on port 80 to http://updates.aatrix.com:

- aatrixforms.exe
- updater.exe
- updater2.exe

For eFiling using secure http on port 443 to https://efile.aatrix.com:

- builder.exe
- viewer.exe

Use Adobe Reader Version 8.1.3 or later for faxing

Customers have reported problems faxing from Sage 100 Contractor with versions of Adobe Reader earlier than 8.1.3. Adobe Reader Version 8.1.3 and later support faxing from Windows and from Sage 100 Contractor.

> **Important!** To fax from Sage 100 Contractor, the Windows Fax Service component must be installed with your Windows operating system. For more information about installing the Windows Fax Service

component, see the Sage 100 Contractor Help topic, "Installing the Windows Fax Service component."

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 8.1, Windows 7 Professional, Server 2008, or Server 2008 R2 Standard

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 8.1, Windows 7 Professional, Server 2008, or Server 2008 R2 Standard operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Configuring Windows Regional and Short Date Format

To specify regional formats for Windows:

1. Click the [**Start**] button, point to **Control Panel**, then click **Clock, Language, and Region** .

2. Click **Region and Language**.

3. On the **Formats** tab, select the format for your country.

4. Under **Date and time formats**, from the Short date format drop-down list, select the format used for your country.

5. Click [**OK**].

6. Close the **Clock, Language, and Region** window.

Windows "Sleep Mode" prevents computers from obtaining a license use

If the computer you are using as a license server goes into sleep mode, other computers on the network cannot obtain a license.

To avoid this possibility, set **Sleep Mode** on your license server computer to **Never**.

To set the Sleep Mode to "Never":

1. In Windows 8.1 Professional, Windows 10, or Server 2012 Standard, click **Start > All apps > Control Panel > System and Security > Power Options**.

   In Windows 7, click **Start > Control Panel > System and Security > Power Options**

2. Select **Change when computer sleeps**.

3. From the **Put computer to sleep** list, select **Never**.

Windows 8.1 Professional and Server 2012 Standard Operating Systems

Sage licensing (Sage 100 Contractor Hosting Framework) cannot auto-start on Windows 8.1

The Sage licensing service (Sage 100 Contractor Hosting Framework) cannot auto-start on computers running the Windows 8.1 Professional or Windows 8.1 Enterprise operating systems. If the service stops, the program displays a message advising you to take further action to resolve this issue.

Server 2012 network configuration and TCP Remoting Channel

Sage 100 Contractor uses the TCP Remoting Channel, a Microsoft .NET Framework component to enable communication among computers on a network. File and printer sharing on computers running the Server 2012 operating system must be enabled. To enable file sharing, follow the instructions in the Windows Server 2012 Help.

Windows 7 Professional and Server 2008 R2 Standard Operating Systems

Launching Sage 100 Contractor to run as administrator for scheduling reports

> **Important!** On computers running Windows 7 Professional or Server 2008 R2 Standard, scheduling Sage 100 Contractor reports requires that you "run as administrator" or to "run the program as administrator."

Microsoft Windows changed security rules in the Windows 7 Professional and Server 2008 R2 Standard operating systems to make your computer more secure. If you are running Sage 100 Contractor as a typical user, then you have limited privileges in some areas of the program, such as saving a report schedule. To save a report schedule, you must launch Sage 100 Contractor with the command to either **Run as administrator** or **Run this program as an administrator**.

When you select either command, the settings are limited to you personally. Your settings to run Sage 100 Contractor as administrator do not affect the next person who logs on and launches Sage 100 Contractor from this computer. Your settings on this computer can either be temporary or persistent. For example, when you select Run as administrator, you run the program as administrator for that session only. When you select **Run this program as an administrator**, you set program properties to always run the program as administrator when you log on to this computer.

Note: "Run as administrator" and "Run this program as an administrator" are not related to Windows 7 Professional or Server 2008 R2 Standard operating systems user groups but are limited to a specific program you are running.

To set "Run as administrator":

1. On your Windows desktop, right-click the Sage 100 Contractor program icon.

2. From the drop-down menu, to launch the program, click **Run as administrator**.

Note: Selecting **Run as administrator** only runs the current session of running Sage 100 Contractor. The setting does not persist after the session is over.

To set "Run this program as an administrator":

1. On your Windows desktop, right-click the Sage 100 Contractor program icon.

2. From the drop-down menu, click **Properties**.

3. On the Sage 100 Contractor Properties window, click the **Compatibility** tab.

4. Under Privileges Level, select **Run this program as an administrator**.

5. Click [**Apply**], and then click [**OK**].

Note: Selecting **Run this program as an administrator** always runs the program with these properties when you launch the program on this computer. The setting persists.

Solution for Windows Server 2008 R2 "Permission Error Opening File"

If you see a permission error message when launching Sage 100 Contractor on a computer running the Windows Server 2008 R2 operating system, follow these instructions:

1. On the Window desktop, right-click **Start**, and then click **Open Windows Explorer**.

2. On the left side of the window, under **Computer > Local Disk**, right-click the \Sage100Con folder, and then select Properties.

3. On the **Sage100Con Properties** window, click the **Security** tab.

4. From the list under **Group or User Names**, select **USERS**, and then click the **Edit** button.

5. On the **Permissions** window, select **USERS** again, and under **Allow**, select the **Full control** check box.

   Selecting **Full control** selects all the check boxes necessary for this solution.

6. On the **Permissions** window, click [**OK**].

7. On the **Sage100Con Properties** window, click [**OK**].

Solution for Windows 2008 Server R2 Application Error Message

Under some circumstances, on servers operating Windows 2008 Server R2, you may see the following error message when trying to open a photograph or image file in Sage 100 Contractor:

"No application is associated with the specific file associated with this application."

This error message appears when you attempt to open an image file in Sage 100 Contractor but you have not yet enabled the Desktop Experience feature in Windows 2008 Server R2. If you receive this error message, install Desktop Experience using the Server Manager utility:

1. In Windows 2008 Server R2, select **Start > All Programs > Administrative Tools > Server Manager**.
2. In the **Server Manager** window, click **Features** (left-hand pane).
3. In the **Features** pane, click **Add Features**.
4. Select the Desktop Experience check box.
5. If you are prompted to add additional features, click [**Add Required Features**].
6. Click [**Next**].
7. Click [**Install**].